

# Content Management in the Utilities Industry

*An interview with Joe Morray, president of Trinity Technologies,  
a Select Services Team Consultant*

**Q: Joe, you have been defining content management systems for very large utilities in recent years. What are the top challenges these companies are trying to overcome?**

The major challenges center on consolidation of companies and information, facility upgrades, retrofits, licensing, and regulatory compliance. Document management systems – now largely known as content management systems – can have an impact on each of these areas.

For example, companies consolidating business enterprises and plants bring together different heritages in document control: form and format of procedures, design drawings, maintenance information, systems, and workflows. Large consolidated utilities need to bring together these information bases to achieve the economies of scale that were frequently the original basis for the mergers. Most plants were designed many years ago and documents tend to reflect different generations of electronic and paper. Now driven by regulatory practices, utilities recognize they need all the information online and available, regardless of format.

**Q: Utility companies are obviously in a very sensitive business, delivering to the power grid and keeping nuclear power plants safe. What trends are you seeing in automation for these kinds of companies?**

The brownout of August 14, 2003 made highly visible the need for better information management at utilities and distribution companies. By definition, content management became mission critical. As they remember the day 50 million people lost power, utilities want to ensure they don't feel the pain of inaccurate information about the grid and their assets through poor record keeping. Utility companies need fingers on many pulses. That means recognizing the value of current and correct information before an event. It's the only chance people have to make good decisions on maintenance, safety, shut downs, and human impact events.

What happened at the Davis-Besse nuclear plant is a good example of the need for power producers to have current information at their fingertips. When problems with leaking CRDM flanges surfaced years ago, workers at Davis-Besse proposed a

## In this interview

### Morray observes:

- Top challenges content management helps utilities face
- How Documentum is used to bring together heritages from consolidated companies
- Trends in content management, observed through Trinity's work with companies such as CAL ISO, MDU Resources Group, Exelon Corporation, Stone & Webster/Shaw Group, and NY ISO.

modification that would facilitate better inspections of the reactor vessel head. Management approved this modification, but then deferred its implementation. What if the workers had a way to learn about the design specification? What if management had the information to prevent the problem in the first place? These are questions that a capable, proactive content management system might have helped answer.

**Q: Regulation is everything in this industry. How can content management help companies take command of the process?**

Content management is all about having command over the information needed to ensure a plant is humanly safe, environmentally clean, and efficient. Content management is the basis for achieving these goals, as well as those surrounding plant performance and requirements. Every producer has different regulatory and performance requirements. Having workflows built into content management systems makes processes standard. Process and standards are everything when it comes to regulation.

**Q: A main focus of Trinity's has always been on workflows. What is the value of having workflows implemented in a content management system?**

The documents are the information. How the information gets used – who creates it, looks at it, approves, distributes, archives – is at the core of a workflow. The workflow represents an automated way to guide a person to reuse information and get value from it. There are three main values to implementing workflows into a content management system. First, workflows can reduce cycle time. Instead of a document sitting in a mail cart or an e-mail in-box, an automated workflow moves the document along to its next defined step.

Second, workflows create an audit trail and allow standards to be built in. The workflow traces every step and ensures due diligence to ensure the proper chain is followed. Third, workflows let companies retain and exploit best practices and procedures, without the heavy thud of a binder landing on someone's desk. Workflows retain and codify procedures so they don't have to be relearned by every new employee.

**Q: Trinity implemented Documentum at Exelon, and there are more than 5000 production users connected to the system there. What makes this kind of mass access to content management possible?**

To have this many people working on a system, it has to be easy and intuitive. Today, that means it has to be web and thin-client based. Our job at Exelon was to define how the information would be stored so it can be accessed without a lot of thought or effort. Next, workflows were put in place to simplify complicated work processes for individual users, making it very easy to participate.

At Exelon, a person can look in his or her e-mail in-box and see a request to take part in a workflow. When he opens the request and comments, the workflow ensures he only has to put energy into sharing his expertise; his job is not complicated with all the

logistics of where information goes next. This is a native Documentum capability that makes workflows very effective.

Documentum was integrated with Exelon's maintenance system, so staff didn't have to relearn a system or fundamentally change how they work. This is important, because asking 5,000 people to change how they work would be a huge challenge. We also implemented software from Trinity called ISE, which is pronounced "eyes," and works like eyes to find content.

In a nutshell, the whole reason for having a content management solution is to get answers. It's essential to be able to store and retrieve information very quickly when you need it, with good quality results. Google has redefined the way searches are performed on the Internet; that single company has increased the value of the web immeasurably.

Through ISE and what we call term-hit highlighting, users can look at what is of interest in documents and get snippets and preview. We have raised the bar on how productive searches can be and help the users better discern what is of value.

**Q: What are the characteristics of most productive document or content management systems you have ever seen?**

The single most important characteristic is how much it is used for the day-to-day processes and decision-making. Over time, there has been a shift away from expecting "big bang" impacts. Instead, companies are asking: Is using the system part of the day-to-day business or is it something that takes effort? Users tell us: if it is being used, it is valuable.

What I have seen at Exelon is getting pretty high up on the list of productive systems, because the web and content management technology from Documentum make it so much easier to ask business-critical questions and arrive at real answers.

**Q: Why do you see companies adopting Documentum over other systems?**

In my experience, Documentum is always evaluated as equal to or better than other solutions. Documentum has proven itself in three key areas: First is the up to the minute use of a wide range of software technologies, both through acquisition and internal development. The technology is very competitive.

Second is the ability to integrate with other systems for an overall IT platform. Today, this environment might include maintenance management, design, ERP, email, and financial systems. Third is a strong financial underpinning of EMC/Documentum. Nothing makes a client feel better than stability.

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